

Annual Report 2022-23



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Introduction from the CDI President



Carolyn Parry

CDI President and Chair of the Board

I am delighted to present this new format for the CDI's 2022-23 Annual report. As part of our continuing focus on making the organisation open and welcoming to current and prospective members, we have combined the key papers from the Annual General Meeting into this report.

Our hope is that this helps you gain a sense of the breadth and depth of work the CDI undertakes as the professional body for career development in the UK. It shows how we continue to deliver against our two areas of focus – supporting our members to deliver best practice, and championing the profession so it is recognised for the huge benefits it brings for individuals, the economy and society.

It is an honour to have been President of the organisation since December 2021, working with the Board, Chief Executive, the team and many others to advance towards the goals set out in the 2025 strategy. We have also made fantastic progress in the three areas I set out at my inauguration speech:

- To act as a voice in the media and amongst influencers; Four of us undertook media training funded by the CDI, resulting in a media reach of 2.8 million people for our exam results day campaign and appearances and coverage on GB News and the Jeremy Vine Show amongst others. It is also particularly encouraging to see so many individual members advocating regularly for our profession on social media,
- To ensure our governance supports the next evolution of the CDI; The Board and I have been working throughout the year to review the CDI's governance and have initiated a project to clarify and simplify the CDI's governance documents so they are fit for the future, and
- To stay connected with members at grass roots; I am delighted to be chairing the restarted Council meetings, re-establishing the connection between members and the CDI leadership as well as keeping in touch with members regularly in the CDI Facebook Group and at events.

It has been an excellent year for the CDI and it is a pleasure to present this report showcasing our successes and where we continue to focus our efforts.



Report of the Professional Standards Committee



Avril Hannon

*Chair of the Professional Standards Committee
(April 2016 – March 2023)*

Introduction

This report of the Professional Standards Committee covers the period from 1st April 2022 to 31st March 2023, during which the Committee has met three times. All Committee meetings this year have been held virtually as we have found this is the best way to maximise attendance.

The 2021 CDI AGM asked all members completing their term of office in the period April 2021 to March 2022 to extend their membership for 12 months, pending completion of the review of the Committee's Terms of Reference and elections were, therefore, held during the current year as those terms of office came to an end.

Mark Yates was re-elected for a further three years to represent Career Guidance/Coaching in the Public Sector, and Sue Edwards joined the Committee to represent Professional Development, replacing John Walker.

Cordelia Wise also joined the Committee to represent Career Guidance/Coaching in the Voluntary/Community sector – the first time the sector has been represented on the Committee

since the creation of that particular professional constituency.

Two long-standing members of the Committee, Lydia Lauder representing Professional Development and Elaine Newell representing Careers Education/Leadership in Schools, Colleges and H.E. came to the end of their second terms of office in the spring of 2023.

Two further members completing their first terms of office: Vicky Love representing England, and Ciara Bomford representing Wales, decided not to seek re-election.

All those who left the Committee during the year had made outstanding contributions to its work in the course of their terms of office and they will all be much missed.

Changes to the Committee's Terms of Reference

The 2022 CDI AGM approved the adoption of new Terms of Reference for the Committee and as a result the title of the Committee changed to the **Ethics and Professional Standards Committee (EPSC)**.

From January 2023 the Committee has also, therefore, been able to welcome Claire Johnson, the CDI's Head of Professional Development and Standards, as a full member. Claire had previously been 'in attendance' at meetings and had also provided the secretarial support for the Committee, a time-consuming job which she had carried out with meticulous care.

That support is now provided by Liz Treadwell, the CDI's Executive Assistant, who now attends the meetings of the Committee in order to produce the Minutes/Action Notes. These are available to members on the CDI website after approval at the next meeting of the Committee.



Work of the Committee during the year

Code of Ethics:

The Committee regularly reviews aspects of the CDI Code of Ethics and this year continued its consideration of ways in which members may be helped when trying to reconcile ethical problems and dilemmas in their day-to-day practice. As reported in 2022, there had been concern that the content



of Case Studies supporting the principles of the Code of Ethics may now be out of date or no longer relevant and that alternative approaches may be more appropriate and helpful to members. As a result, it was decided to halt the future production of Case Studies and withdraw those that were already out of date from the CDI website. Case Studies for use by students will, however, continue to be produced by Course Tutors.

The possibility is being explored of developing a regular column in Career Matters in which ethical dilemmas could be shared and potential courses of action debated and in addition to an edition of Career Matters taking ethics as its central theme, articles on the subject by Claire Johnson and Avril Hannon have been published during the year.

Several actions have been taken to raise the profile of the Code of Ethics, and, in particular, the Careers & Enterprise

Company’s Impact Review pilot documentation now contains reference to the CDI Code of Ethics and the responsibility of CDI members to be impartial, in accordance with its principles. Discussions are also on-going with DfE about mention being made of a code of ethics in the National Careers Service Customer Charter which is currently being reviewed.

Two CDI members made direct representations to the Committee on the question of ethical problems in the course of the year, both of which formed the basis of debate and discussion. As a result, the Committee intends reviewing the wording of some of the principles and is also considering producing some contextual guidance for all the Code’s principles, in order to aid understanding.

There has also been work on the production of a shorter version of the Code of Ethics which might be more appropriate to the needs of younger clients and aid their understanding of what they might expect from a discussion with a Career Development professional.

CDI Strengthening Standards pillar of the CDI Strategy 2025:

Members of the Committee have collaborated with the CDI’s Head of Professional Development and Standards’ work on the Strengthening Standards roadmap and this work is on-going

Chartered Status:

The Committee has contributed to the work being done on exploring Chartered Status by Nicki Moore, including a presentation on the results of research undertaken during the year.

UK Career Development Awards and CDI Fellowships:

Members of the Committee have, as usual, chaired and participated in judging panels for the 2022/2023 UK Career Development Awards.



Together with representatives of the CDI Board, under the chairmanship of the Chair of EPSC, they have also participated in the judging of the award of CDI Fellowships. The award of Fellowships to Jan Ellis, Liz Reece and Michelle Stewart were agreed and the Fellowships panel also

approved the award of CDI Fellowships to ten members who had previously held Legacy Fellowships, in recognition of their commitment and contribution to the CDI since its formation in 2013. These awards were all presented at the Awards Dinner in June 2023.



Developments in the CDI Constituencies:

Members of the Committee have continued to report at each meeting on professional development issues and/or matters relating to ethics and standards in the Constituency which they represent. These reports provide an invaluable vehicle for members to learn of developments in other parts of the professional sector, and frequently result in the identification of topics for discussion at future meetings of the Committee. Our members are concerned, therefore, that they should be able to fully represent the interests of their constituents, and would be pleased to hear from individual members of their concerns. Contact details for members of the Committee will be found on the CDI website.

Future plans

In the coming year the Committee will continue to consider ways in which the Code of Ethics may be made more visible, and more readily understandable to both members and non-members.

It will, as ever, keep the relevance and fitness of the Code under review and discuss mechanisms which might enhance members' ability to understand and respond to ethical dilemmas and difficulties.

The Committee will also be consulted on amendments to the governance of the CDI and it also has on-going work to support the research into Chartered Status. It will, in

addition, contribute to the CDI's Digital Strategy and, as always, work with the Head of Professional Development and Standards in support of CDI members' continuing professional development.

Any thoughts or contributions from members are always most welcome, both on these topics or any others about which members may have concerns.

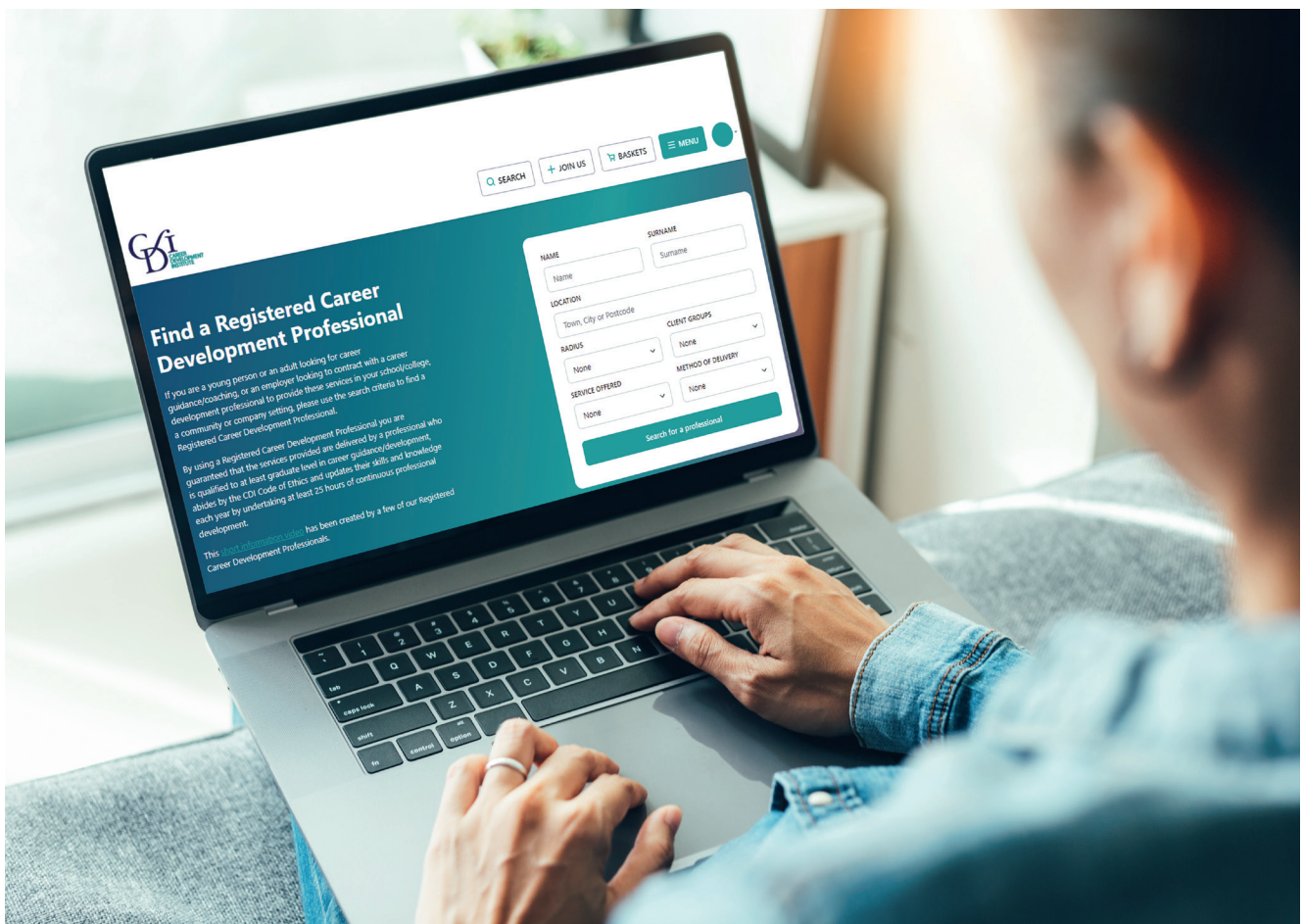
Conclusion

My thanks to all the members of the Committee for their hard work and dedication, and in particular to Claire Johnson who works tirelessly to ensure the Committee is responding to new developments and able to conduct its discussions in a constructive and informed manner.

Liz Treadwell is now providing the secretarial support for the Committee, and her contribution is also much appreciated.

This report marks the end of my commitment to EPSC as its Chair. I believe that there has been increasing support for and interest in the work of the Committee from the membership in recent years, and this has been extremely encouraging.

I wish all the members of the Committee and its new Chair, John Walker, good luck for the future and know that they will continue to provide an invaluable service to the members of the CDI.



Chief Executive Annual Report



David Morgan

CDI Chief Executive

Introduction

The year from April 2022 to March 2023 was our first full year of working towards the 2025 Strategy, and this report has been written to reflect the key elements of the strategy, highlighting the extensive work undertaken by the staff, Board, Associates and volunteers to make fantastic progress in all areas.

It has been another very positive year for the CDI, with growth in memberships, income and influence. The focus provide by the 2025 strategy has enabled us to have greater impact by identifying and prioritising opportunities for new or improved services, for operational efficiencies and to improve the way we engage with our members and stakeholders.

Our work continues to be driven by the dual threads that underpin everything we do – to support our members and champion the profession. With the growing cost-of-living crisis we held our membership fees flat for another year and introduced new, lower-cost CPD opportunities. We further improved communications and engagement and continued to seek feedback through the #CDIBigListen surveys.

We actively championed the profession - in our own right, as part of the Career Development Policy Group and through our work with many other organisations. We enhanced our media engagement with CDI-funded media training for spokespeople and responded to many policy inquiries and consultations.

As we and our members return to a new normal following the worst of the pandemic, we successfully ran our first major face-to-face event since early 2020 – the National Careers Leaders' Conference. Feedback via the #CDIBigListen surveys continues to favour a blend of online and face-to-face events over returning to fully face-to-face as before.

In addition to evolving our usual activities, we have made significant progress with two transformational projects. The chartership work continued with a significant piece of research across the profession showing a strong appetite for chartership and for the CDI to act as the lead organisation. We also initiated our digital transformation project, one of our largest ever investments that will hugely improve the way our members and stakeholders engage with the CDI, as well as enable key elements of the 2025 strategy.



2025 Strategy

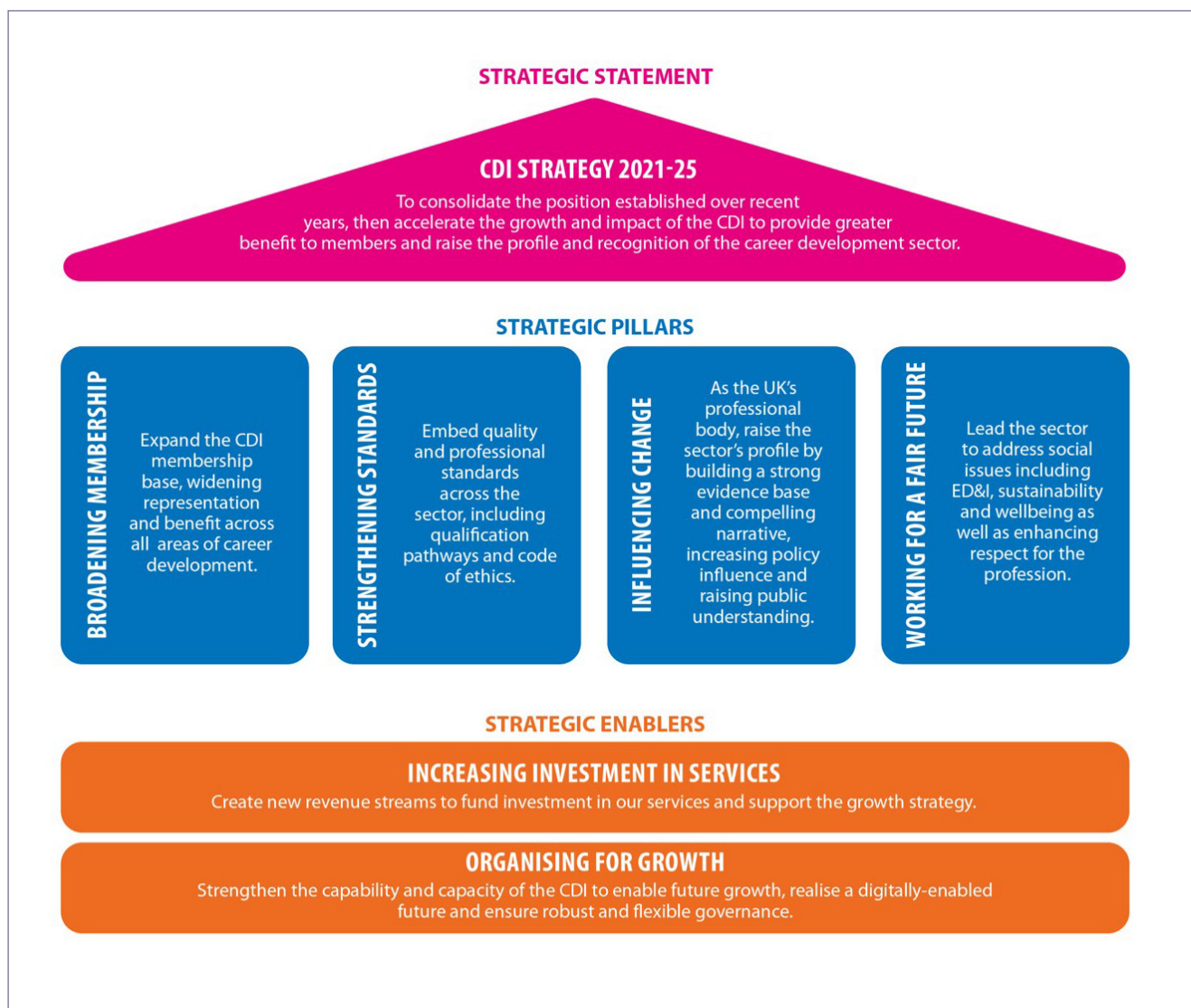
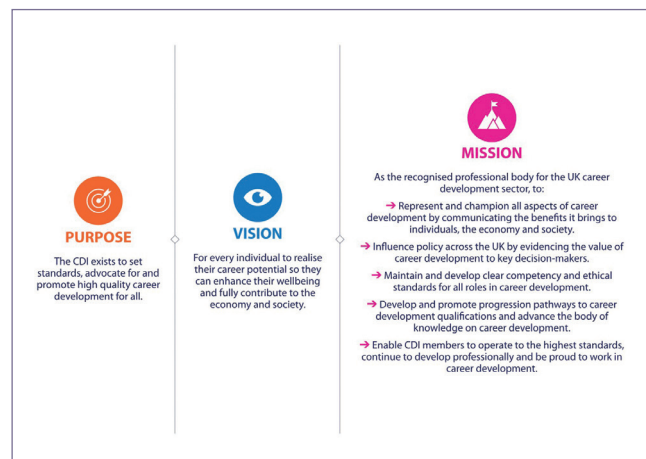
The 2025 Strategy sets out the purpose and direction of the CDI. It builds on the success of the organisation to date, with a focus on investment to maximise our impact for members and the profession.

The strategy sets out our Purpose, Vision and Mission. Our Vision is consciously focused on the end-user, to reflect that all the work of the CDI and its members is ultimately to benefit individuals.

The strategy comprises an overarching Strategic Statement setting our overall ambition, along with the four Strategic Pillars which outline the areas of focus to achieve that ambition. These are supported by two Strategic Enablers, the foundational areas we have to get right to allow us to support the rest of the strategy.

This clear direction has been valuable throughout the year in communicating our role, where we are heading and why we

are making investments in key areas. They guide the work of the team, helping prioritise between multiple opportunities and identify gaps to be addressed. This report outlines the progress we have made in delivering against our strategy, and where we continue to focus in 2023-24.



Financial Overview

The CDI had a very positive year financially, with revenues growing by just over £100,000. While profit has returned to 2019-20 levels after two years of higher levels, this is a planned approach reflecting the increased investment in the CDI’s core capabilities.

Year	Income	Expenditure	Surplus
2018-19	£752,238	£717,044	£35,194
2019-20	£961,629	£915,601	£46,028
2020-21	£964,116	£817,474	£146,642
2021-22	£980,325	£903,336	£76,103
2022-23	£1,088,760	£1,047,211	£41,185

Despite capital investment of £123,031 and additional licensing costs of £38,300 for the digital transformation project during 2022-23, our cash position remains very positive and significantly above the reserves target. Cash held above the reserves target has been nominated as an ‘investment fund’ – available for investment in key capability projects, such as the digital transformation.

Year	Cash in hand	Reserve target	Investment fund
2019-20	£259,468		
2020-21	£550,920		
2021-22	£629,865	£240,000	£422,642
2022-23	£531,693	£300,000	£231,693

Income

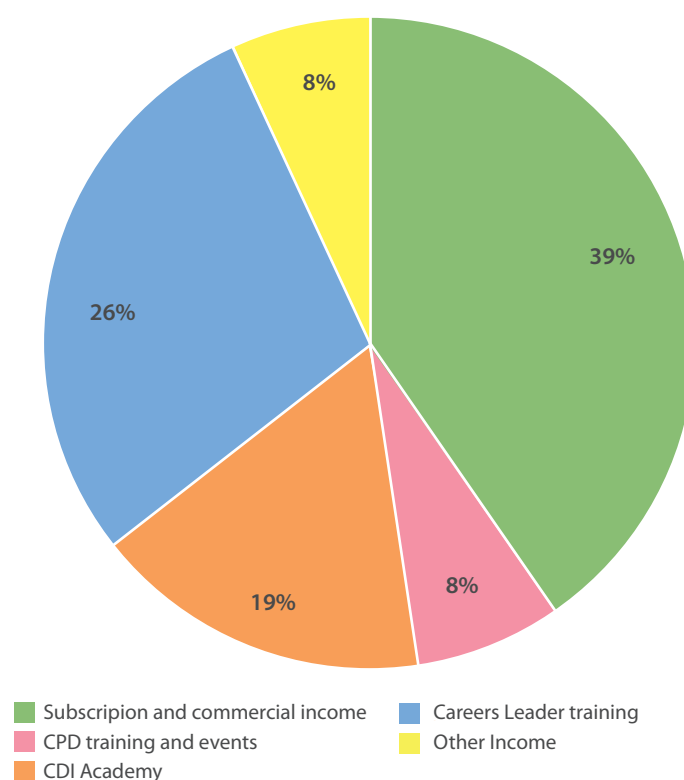
Overall, income increased year on year, with the mix of income changing.

- Subscription and commercial income increased by 3%.
- CPD training and events income fell by 5%.
- The CDI Academy continued to perform very well, growing 22% after more than doubling the previous year.
- Careers Leaders training rebounded to grow 14%.
- Other income increased by 46% though is still the smallest share of overall income.

Maintaining membership volumes and income was an achievement given the difficult economic conditions. Given concerns about the cost-of-living crisis impacting members, we held our membership fees flat again and launched a two-tier CPD model with a lower-cost option. This change, and a softening of paid CPD demand, affected CPD revenues.

Conversely, demand for formal training and qualifications via the CDI Academy continued to thrive. Combined with a return to growth for the Careers Leader training, these areas drove overall income growth in 2022-23.

2022-23 Income distribution



Expenditure

Expenditure increased by more than income in 2022-23 as we invested further in the organisation’s capability. Aside from the increased costs of delivery for the income growth areas (such as paying higher training staff fees as the Academy and CEC income grew), the biggest rise from 2021-22 was in staff costs. This was due to being the first full year cost of the new roles (Events & Commercial Manager, Memberships & Marketing Manager). We also recruited the EDI Associate and engaged PA support to reduce the workload on the Honorary Secretary and Chief Executive.

Licenses and hosting costs increased to support the new website, totalling £38.3k in the year. The capital spend of £123,031 is excluded from the expenditure lines and captured in the balance sheet. This reflects the bulk of the development work on the new website, which will have a long-term positive impact on the organisation and its members.

We closely managed overheads over the year, though there was cost growth in areas such as Career Matters (higher costs of paper and switching to compostable packaging), governance (research to support governance review), a new exhibition stand, the second stage of chartership research, media training for spokespeople to represent the profession and more policy papers.



Profitability has declined, which was planned. With more than sufficient funds in the organisation, the focus is shifting to reinvesting profits to build the capacity and capability of the organisation and grow our activities as a professional body. In 2023-24 our healthy financial position will enable us to increase our focus on research, campaigns and developing member services, so we can continue to add ever greater value to our members and the profession.



Broadening memberships

Memberships

As the UK professional body for career development, the CDI's goal is to expand our membership across all areas of practice, geographies and communities.

With the difficult impacts of the cost-of-living crisis, we began 2022-23 with some concerns over membership retention. However, membership numbers actually grew from 4,820 in May 2022 to 5,020 in March 2023. This is down to a number of positive factors:

- We redesigned the member welcome and renewal processes to highlight the benefits of membership.
- We ran campaigns to re-engage lapsed members, advertising on LinkedIn and contacting via email.
- We encouraged student members to upgrade to full membership, including launching new content on the Moodle e-learning platform highlighting their membership benefits.
- Updated the About Us section of the website to make the information clearer and encourage engagement with the CDI communities.
- Increased website usage by 31%, from 910k page views to 1.2m over the year.
- Attended the first National Careers Guidance Show since the pandemic began, historically a positive member recruitment event.
- Had our first stand at the UCAS Teachers & Advisers Conference and gave three talks, reaching new potential members.

Membership recruitment is positively impacted by all our activity, from events to policy engagement, and as these activities become more impactful, they will underpin continued membership growth.

UK Register of Career Development Professionals



At the end of March 2023, the number of people on the Register was 1,828. Of these people, 832 have a register profile advertising the career development services they offer. Interest in joining the Register steadily increased thanks in part to publicity of their RCDP status by members using the CDI Facebook Group for Career Development Professionals and promoting the use of the lapel pin and logo.

Fellowships and Rodney Cox Award

At the UK Career Development Awards in 2022, three members were awarded CDI Fellowships – Kath Wright, Alan Bullock and Claire Johnson. We would like to congratulate Kath, Alan and Claire on this prestigious award and to thank them for their ongoing service to the CDI and the career development profession.

Congratulations to Jane Artess who won the Rodney Cox Lifetime Achievement Award at the UK Career Development Awards.

CDI Big Listen surveys

The two #CDIBigListen surveys showed continued high, and improving perceptions of the CDI and our services, with satisfaction with CDI membership rising from 67.7% to 70.2% and those likely to renew their membership increasing from 76.4% to 83.3%. We also explored members' and non-members' views of working in career development, an important input to our campaign activities. Those saying they were likely or very likely to leave the profession in the next two years declined from 28% to 23%, in line with the survey run for Careers England. We also included new questions covering diversity in career development as part of the EDI strategy development.



Training and Events

The CDI continues to offer a wide range of high-quality CPD support, including some of the biggest events in the career development calendar, such as:

- February saw Dr Lyn Barham's last quarterly online Practitioner Research Meeting. These have covered the need for a research question, collecting evidence, use of data and writing up and disseminating research.



- CPD Conference Scotland on 10th March, focused on Career Coaching and held with Edinburgh Napier University, University of the West of Scotland and Skills Development Scotland.
- CDI England and Wales Student Conference on 13th April, showcasing the variety of roles in career development, putting theory into practice and the value of CPD after qualifying.
- We intended to hold a family day to mark the 100-year anniversary of the first career development professional

body. Despite a huge effort, ticket sales were low and the event was cancelled.

- The cancellation meant we had to restage the 2022 UK Career Development Awards as an online event on 22nd June, which was very successful.



- National Careers Leaders' Conference (NCLC) at the University of Derby on 30th June with iCeGS and Optimus Education was our first return to a major face-to-face event. We had 170 attendees and 18 exhibitors and the feedback was excellent.
- We held a Presidents' and Fellows' Lunch on 1st November, attended by representatives of current and historical professional bodies, CDI Fellows and special guests.
- The National Research Conference for Practitioners was on 16th February, held in conjunction with NICEC, iCeGS and AGCAS, exploring 'What difference does research make?'

In addition, we continued to offer a programme of free and paid for online CPD training, at discounted rates for members, along with Digital Bytes webinars and regional meetings. In response to the growing cost-of-living crisis, we split the paid webinars into two tiers, with online workshops staying at £50+VAT for members then introducing new expert webinars for only £15+VAT. We also delivered private CPD commissions for organisations seeking bespoke training for their teams.

Member engagement

Oliver Jenkin took over from Alison Dixon as the Editor of Career Matters and we would like to thank Alison for her many years' devotion to delivering an excellent magazine. From January 2022, we moved to compostable wrappers for three editions a year of the posted magazines, removing plastic use for around 13,500 copies annually.

The Career Development Practitioners' Community of Practice on Facebook grew from just over 1,100 to 1,367 members. The forum is very active and continues to offer excellent peer support. The Careers Leaders' forum continued to be active and includes resources to help school and college leaders.

Series six and seven of the #WeAreCareers livestream featured a wide range of excellent guests, shout-outs to careers heroes and updates on CDI activities. The show continues to present engaging content and has a loyal and growing audience.

In Scotland, the Facebook group continues to offer support, along with online meetings covering a diverse range of topics. We also presented webinars with Skills Development Scotland as part of Careers Week Scotland, promoting CDI membership and encouraging people to enter the profession.

In Wales, the regular Forum brings together a range of stakeholders with an interest in career development, to discuss key topics affecting clients and the economy. The CDI also supports Careers Wales with bespoke CPD training sessions.

Strengthening Standards

Under the ‘Strengthening Standards’ pillar of the 2025 Strategy, the CDI supports members as they train to enter the profession using a variety of routes and then continue to develop their skills, knowledge and ethical practice through CPD. A key development in 2022/23 was the production of the Strengthening Standards Vision paper, setting out key aspects of professional development and standards to review to ensure the profession remains at the forefront of best practice.

Qualification in Career Development (QCD)

The eight QCD centres continued with online delivery combined with some face-to-face delivery to 98 students who started their studies in Autumn 2022. Centres reported a downturn in the number of people applying for the QCD, perhaps due in part to greater numbers opting for the work-based Level 6 Diploma in Career Guidance and Development and its flexibility for employers.

QCD students were supported with the Scotland CPD Conference and the England and Wales Student Conference, both held online. The increased accessibility of these events was appreciated by delegates and this method of delivery will continue. Moderation of QCD Professional Reports, centre visits, Moderators’ and QCD Leaders’ Meetings continued to take place mainly online on the grounds of time and cost efficiency.

The CDI Academy

Course attendance in 2022 -2023 continued to be online with some face-to-face delivery for courses covering interviewing skills. Courses attracted those wishing to enter the sector, to progress from Careers Leader to Careers Adviser roles, qualified Careers Advisers wishing to further develop their skills and knowledge and Careers Assistants wanting to learn more about career-related learning.

	Completed	Undertaken
L6 Diploma in Career Guidance and Development	31	91
L6 Careers Leader (Accredited)	4	6
L6 Careers Leader (non Accredited)		1
Professional Certificate (Supporting Clients with Additional Needs)- Non-Accredited	68	27
L4 Career Assistant - Supporting Career-Related Learning in Schools and Colleges	11	6



C&EC funded Careers Leader training
delivered by the Career Development Institute

BOOKING IS NOW OPEN

As the UK-wide professional body for the career development sector, the CDI is ideally placed to deliver this training.

All of our trainers/assessors have many years’ experience of supporting professionals to develop career programmes and since 2018 have successfully delivered this training to over 600 Careers Leaders.



Who is this programme for?
Careers Leaders come from state-funded schools, colleges, special schools, PRU and Alternative Provision. Some of them have been in this role for several years, whilst others are new to the role of Careers Leader.

What does the programme cover?
The overall purpose of the Careers Leader training programme is to equip and enable Careers Leaders to prepare and implement a strategic plan for developing a careers programme in their organisation that meets the eight Gatsby Benchmarks.

Costs
The programme is fully-funded by the Careers & Enterprise Company. In addition, on successful completion of either the accredited or the non-accredited training, the delegate’s employer will receive a £1000 bursary from the C&EC.

Next steps
If you would like more information about the training please contact the CDI Head of Professional Development & Standards, Claire.Johnson@thecdi.net.

Booking is now open
There will be start dates in September, October, November, December 2022 and potentially January 2023, subject to demand. To book a place on this training please register via the C&EC website:

careersandenterprise.co.uk/careers-leaders/careers-leader-training



thecdi.net

Careers Leader Training funded by the Careers & Enterprise Company

The CDI continues to be an important provider of this training, with 133 learners completing by September 2022 and a new cohort of 235 learners who will complete in October and December 2023. We completed the requested evaluation report for the training, covering lessons learned and improvements made to the programme, as well as featuring quotes from candidates and their line managers on the positive impact of the training.



Student Newsletters

To support our 500+ CDI Student Members we continued to produce termly Student Newsletters. Students receive the same membership benefits as individual members and the newsletter provides opportunity to promote these including forthcoming CDI webinars, events, etc. of relevance to their studies.

CPD Monthly Newsletters

Having started in 2016, Dr Lyn Barham produced her final CPD Newsletter in March 2023, with Erica Rowell taking on this work from April. The newsletters are very well received by members who refer to previous editions for inspiration on particular topics. We would like to thank Lyn for her many years of work in producing these newsletters, developing the CPD Resources area and organising and supporting the online Practitioner Research meetings.

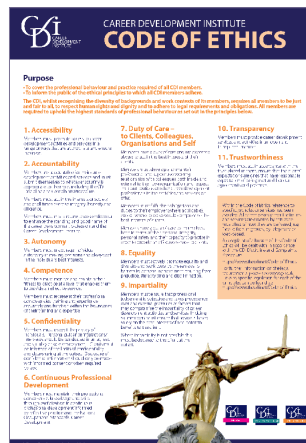
CPD Resources

Throughout the year we continued to add to the resources in the members’ only CPD Resources section of the website including additional materials on undertaking research. Accessible from the home page, we also produced new briefing papers and guidance to support the work of members.

Supervision

We delivered online training for Supervisors in September 2022 based on the CDI Guidance on the Benefits and Delivery of Supervision in the Career Development Sector. Due to small numbers attending online training we are looking at Moodle as a future means of delivering more flexible and cost-effective training for Supervisors and Supervisees.

(Ethics and) Professional Standards Committee



The CDI’s professional development work is supported by the Professional Standards Committee (PSC) which became the Ethics and Professional Standards Committee (EPSC) in December 2022. We’d like to thank the outgoing Chair, Avril Hannon, for her dedication to the committee over many years and all previous and new committee members for their hard work and support over the year.

Careers Assured

The Careers Assured quality mark signifies the digital products and CPD resources that meet the needs of career development practitioners. We were delighted to award Careers Assured to Xello for their careers platform, East Riding of Yorkshire Council and Hull City Council for their >log on Move on< product and Kent Choices for their careers website.





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Influencing change

Under the 'Influencing Change' pillar of the 2025 strategy, the CDI continues to champion the career development profession in numerous ways, from developing collaborative approaches with other careers organisations to campaigning on key issues and responding to consultations across governments.

Media activity

We initiated activity to raise our profile in the media, with some success:

- Funded media training in July for four spokespeople to engage the media on behalf of the CDI and the profession.
- Our exam results day campaign, which was a huge success. Press releases for Scotland and A level results days received coverage on 8 local media websites, with three radio interviews and a GB News interview, reaching 2.8 million people.
- A letter published in the Guardian regarding the challenges for parents helping their young people had a huge response on social media from colleagues across the careers profession.

Policy in England

2022-23 has been a busy year for careers policy activity for career development:

- The Sir John Holman review concluded with recommendations presented to the Minister. The CDI contributed through meetings, roundtable attendance and written contributions.
- We provided evidence to the Education Select Committee inquiry into careers guidance. Disappointingly the CDI was not called to give oral evidence.

- The Labour Party produced a report on 'Learning and skills for economic recovery, social cohesion and a more equal Britain'. The CDI published a briefing paper on the report which was shared with Toby Perkins MP and Matt Western MP.
- We submitted a response to the Work and Pensions Committee's Plan for Jobs and Employment Support and for the Commission on the Future of Employment Support.
- The CDI attended two discussions by the Skills Commission on Higher Technical Qualifications.
- We had meetings throughout the year with the DfE, discussing different areas of interest such as the recruitment and retention issues within the profession.

We continue to brief parliamentarians on careers related legislation as it passes through the Houses.

Policy in Scotland

Throughout 2022-23, we engaged with the Careers Review in Scotland, meeting with the review's leadership and SDS and providing written submissions and comment on proposals. We sought to engage more fully and by the end of the year were included in the new Careers Collaborative. We continued to develop the relationship with Skills Development Scotland, running events as part of Scotland's Careers Week to promote CDI membership.



Engagement in Wales

We continued to support Careers Wales and build the profile of career development in the wider community. Regular Forums were held with attendees from Careers Wales, employers, charities and organisations with an interest in career development. In addition, tailored CPD events were run for Careers Wales and we successfully delivered consultancy contracts for the Welsh government to support the careers system.



Career Development Policy Group (CDPG)

As a member of the CDPG, we continued to champion the Career Guidance Guarantee, with a summary paper from three roundtables held in early 2022. Following Sir John Holman’s recommendations, the CDPG wrote to Robert Halfon MP and Toby Perkins MP (Shadow Minister), leading to productive meetings with DfE and Toby Perkins to discuss key points. The CDPG is currently working with Policy Connect on behalf of the All-Party Parliamentary Group for Skills, Careers and Employment, to hold an event at the House of Lords in July 2023.



Recruitment and Retention campaign

The CDI’s #CDIBigListen survey showed a worrying level of people likely to leave the profession and we supported additional research by Careers England to gather data from careers providers and develop solutions to the issue. This

provided valuable insight as well as further raising the profile of the issue, leading to discussions with DfE and other organisations, as well as a talent pipeline webinar in March 2023, covering advocating for the sector, gaining the recognition we deserve and how to encourage a pipeline of talent to make the sector robust and diverse.

Working with other organisations

We continued to engage with key organisations to directly and indirectly support career development. These included:

- Joining Gatsby Charitable Foundation’s national advisory group for their ten-year review of the Gatsby Benchmarks. We also submitted a response to Gatsby’s review of adult careers provision.
- Attending the CEO Club of the Sector Skills Councils, hosted by the CBI, to engage with large industry and employer groups on government policy. This included meeting with a Labour Party advisor on skills and career development opportunities.
- Building an active relationship with UCAS, with regular articles on their blog for teachers and advisers, CDI-branded webinars for UCAS Advisers receiving excellent attendance and feedback, as well as a stand and speaking opportunities at UCAS’ Teachers and Advisers Conference.
- Supporting WWF as they launched their Sustainable Futures environmental careers programme for schools. The CDI are represented on the programme’s advisory board.

CDI representatives also sat on key advisory and steering groups including the Board of the Quality in Careers Standard, the matrix Standard review and the Careers England Board.

We also attended receptions at Parliament and the CBI conference to gain visibility of the business climate, including speeches by the Prime Minister and Labour Leader.

Working for a fair future

EDI strategy

The main development focus for this pillar was the CDI's Equity, Diversity and Inclusion (EDI) approach. We welcomed Ifza Shakoor as our first EDI Associate and the key focus of the work over the remainder of the year was the development of the EDI strategy.

Help shape the CDI's EDI strategy

As a key part of developing the CDI's new Equity, Diversity and Inclusion (EDI) strategy, we will be running a series of workshops exploring the issues faced in widening diversity within career development and potential actions to overcome them.

Each workshop will focus on one diversity characteristic, including gender, ethnicity, sexuality, disability, socio-economic status, religion and intersectionality. Workshops will be participatory, where attendees can use this platform to inform key EDI policy.

The workshops aim to bring together people with lived experience within diverse communities as well as those with a keen interest in addressing diversity issues across career development.

Attendance will be open to CDI members and non-members, to engage people from across all areas of the career development profession.

Timings and further information will be available soon and shared on the CDI's social media accounts @theCDI

The winter #CDIBigListen survey included new questions on EDI, providing a baseline to track progress and acting as a key input to seven workshops held in January 2023. These discussed different aspects of diversity and ensured we heard from those with lived experience to input to the EDI strategy. The strategy is on track to be launched in 2023-24.

Team development

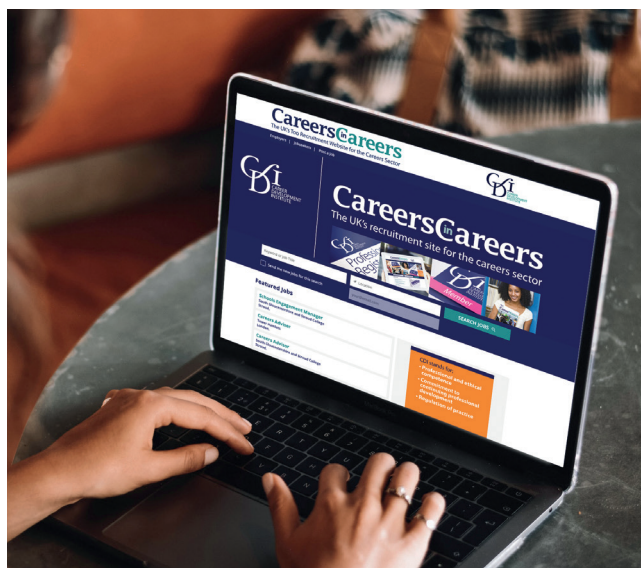
We continued to review team reward levels, especially in light of the cost-of-living crisis. We also launched an Employee Assistance Programme to support the team and the Board, giving access to confidential advice services. Additional employee benefits will be explored during 2023-24 to ensure the CDI offers a fair benefits package.

Investing in our service

We continue to offer commercial as well as membership services, to generate profitable income that we can then invest in our work to support members and champion the profession.

We made a number of changes during the year to enhance our current offer, including:

- Updating and improving our commercial brochure to more clearly show the opportunities of working with the CDI to reach members and the wider profession.
- Xello sponsored the National Careers Leaders' Conference and we had the maximum number of exhibitors we could manage.
- Launching 'sponsored webinars' as free webinars for members and non-members, subsidised by commercial partners.
- Splitting our paid webinars into Expert Workshops (remaining at £50+VAT for members) and new Expert Webinars (only £15+VAT for members), encouraging members to continue with their CPD despite resources potentially being tighter.



Careers in Careers

The Careers in Careers jobs board performed very well in the first half of the year. However, with team changes it had a weaker second half. Vacancy postings continue at a good level and with a new team member joining in 2023-24, they are expected to grow again in the coming year.

Commercial contracts

We delivered a series of consultancy contracts in 2022-23, primarily for the Welsh government, including two supporting careers and work-related experiences (CWRE).

Organising for growth

Over the year we recruited the President Elect, Honorary Secretary, Board members and EPSC members. Recruitment for the Chair of EPSC role was unsuccessful and will be repeated in 2023-24. We engaged an Executive Assistant to support the Honorary Secretary, significantly reducing the workload for this post. They also provide support to the Chief Executive, EPSC and other Board activities.

We would like to thank Monica I Lemecha for her many years of service as Honorary Secretary and to Julie-Anne Jamieson and Craig Garton who had served as Directors. We welcomed Pete Robertson to the Board as President Elect and Elaine Inglis as a member-elected Director.

The Board has progressed work to clarify and update the CDI governance documents and approach. Also, the first Council meeting was held since the pandemic began, re-establishing the connection between members and the CDI leadership.

Chartership

Following initial work to understand the implications of chartership for the career development profession, we undertook a significant piece of research, led by the International Centre for Guidance Studies. This captured views from many individuals and organisations, with a large majority supporting chartership and the CDI taking the lead in making a petition.

The CDI Board agreed to move to the next stage, working with organisations across the profession to identify the activities needed to move towards a chartership application. A final



decision on whether to apply will be made at that stage, but the activities needed to meet chartership requirements will be beneficial to the profession whether an application is ultimately made or not.

Digital transformation

A critical enabler of the strategy is replacing the CDI's website and member management system. In July the Board approved the investment in the digital transformation project, one of our largest ever investments. The project aims to make it easier to engage members, non-members, stakeholders and the public, improve efficiency and future-proof our digital capability. Development progressed well and by the year-end it was within budget but with a delayed launch date. However, there are no direct dependencies on this date, so the impact will not be significant.

Phone system

A known issue has been the CDI telephone system. A new system was implemented in March 2023, giving greater flexibility and reliability. However, we still have some issues which need to be addressed.

CDI team changes

Jo Thorniley left her role as Business Development Manager, to be replaced for a short period by Marie Alexander, and Juliette Knowles left as Events Manager. These two roles were combined into an Events and Commercial Manager position and Jen Ellin was appointed in November 2022. We will recruit an Events and Commercial Executive in 2023-24. On behalf of everyone at the CDI, I would like to thank Jo Thorniley, Marie Alexander and Juliette Knowles for their work with the CDI.

We contracted CitrusHR to provide ongoing HR support, including an easy-to-use HR management platform, advice and policy support.



Summary

This report demonstrates the CDI's progress towards the 2025 strategy, making advances in every area. Continuing to deliver our core services and make incremental improvements while also undertaking the major digital transformation project has taken a huge effort by our fantastic team, supported by the Board, EPSC, Associates, volunteers, partners and members.

We continue to fulfil our dual role of supporting our members and championing the profession, and we continue to invest to grow our impact in these areas. We strive to offer high-quality, relevant services to our members and effectively engage key stakeholders to showcase the benefit the profession brings.

Our CPD webinars, major conferences and events and programme of accredited and non-accredited training support everyone working in career development. The CDI Code of Ethics and the resources we develop, such as the Career Development Framework, reinforce our commitment to the highest professional standards.

We continue to look to the future with major activities such as the chartership of the profession, the digital transformation project and the EDI strategy, determined to fulfil our role as a leader within this amazing profession and enable everyone to realise their potential.

We can only invest in our people, services and campaigning if we have healthy finances. 2022-23 has been another very positive year in this regard, with the organisation now in a position to look towards further investment in 2023-24 and beyond. Our capacity, capability and effectiveness continue to increase and we look forward to exploring new opportunities in the coming year.

Like everyone, the CDI faces ongoing challenges – the cost-of-living crisis, uncertain global impacts from the invasion of Ukraine, an upcoming general election and more – but we are in an excellent position to support our members through these and keep championing the profession for the value it adds for individuals, the economy and society.

I would like to thank all the CDI team, Board, EPSC, Regional Reps, Associates, volunteers and partners for your huge efforts and dedication to making the CDI an even better professional body. I look forward to building on these successes as we move into a new financial year.



Unaudited financial statements

For the year ended 31 march 2023

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Balance sheet

	Notes	2023		2022	
		£	£	£	£
Fixed assets					
Intangible assets	4		123,031		-
Tangible assets	5		18,792		20,069
			141,823		20,069
Current assets					
Debtors	6		178,786		102,702
Cash at bank and in hand			531,983		629,865
			710,769		732,567
Creditors: amounts falling due within one year	7		(472,574)		(393,122)
Net current assets			238,195		339,445
Total assets less current liabilities			380,018		359,514
Creditors: amounts falling due after more than one year	8		(25,406)		(36,990)
Provisions for liabilities			(3,570)		-
Net assets			351,042		322,524
Reserves					
Called up share capital	9		-		-
Income and expenditure account			351,042		322,524
Members' funds			351,042		322,524

The directors of the company have elected not to include a copy of the income and expenditure account within the financial statements.

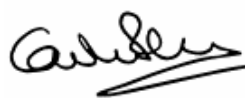
For the financial year ended 31 March 2023 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared and delivered in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the board of directors and authorised for issue on 9 August 2023 and are signed on its behalf by:



Mrs C Parry, Director
Company Registration No. 08226390

Notes to the financial statements

For the year ended 31 March 2023

1. Accounting policies

Company information

Career Development Institute is a private company limited by guarantee incorporated in England and Wales. The registered office is Ground Floor, Copthall House, 1 New Road, Stourbridge, West Midlands, United Kingdom, DY8 1PH.

1.1 Accounting convention

These financial statements have been prepared in accordance with FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the requirements of the Companies Act 2006 as applicable to companies subject to the small companies regime. The disclosure requirements of section 1A of FRS 102 have been applied other than where additional disclosure is required to show a true and fair view.

The financial statements are prepared in sterling, which is the functional currency of the company. Monetary amounts in these financial statements are rounded to the nearest £1.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

1.2 Income and expenditure

Income and expenses are included in the financial statements as they become receivable or due. Expenses include VAT where applicable as the company cannot reclaim it.

1.3 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Amortisation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Online platform – 5 years straight line

1.4 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Plant and machinery – 15% reducing balance method

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is credited or charged to surplus or deficit.

1.5 Impairment of fixed assets

At each reporting period end date, the company reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any). Where it is not possible to estimate the recoverable amount of an individual asset, the company estimates the recoverable amount of the cash-generating unit to which the asset belongs.

Recoverable amount is the higher of fair value less costs to sell and value in use. In assessing value in use, the estimated future cash flows are discounted to their present value using a pre-tax discount rate that reflects current market assessments of the time value of money and the risks specific to the asset for which the estimates of future cash flows have not been adjusted.

If the recoverable amount of an asset (or cash-generating unit) is estimated to be less than its carrying amount, the carrying amount of the asset (or cash-generating unit) is reduced to its recoverable amount. An impairment loss is recognised immediately in surplus or deficit, unless the relevant asset is carried at a revalued amount, in which case the impairment loss is treated as a revaluation decrease.

Recognised impairment losses are reversed if, and only if, the reasons for the impairment loss have ceased to apply. Where an impairment loss subsequently reverses, the carrying amount of the asset (or cash-generating unit) is increased to the revised estimate of its recoverable amount, but so that the increased carrying amount does not exceed the carrying amount that would have been determined had no impairment loss been recognised for the asset (or cash-generating unit) in prior years. A reversal of an impairment loss is recognised immediately in surplus or deficit, unless the relevant asset is carried at a revalued amount, in which case the reversal of the impairment loss is treated as a revaluation increase.

1.6 Cash and cash equivalents

Cash and cash equivalents are basic financial assets and include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

1.7 Financial instruments

The company has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the company's balance sheet when the company becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

Basic financial liabilities

Basic financial liabilities, including creditors, bank loans, loans from fellow group companies and preference shares that are classified as debt, are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of business from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

1.8 Derivatives

Derivatives are initially recognised at fair value at the date a derivative contract is entered into and are subsequently remeasured to fair value at each reporting end date. The resulting gain or loss is recognised in surplus or deficit immediately unless the derivative is designated and effective as a hedging instrument, in which event the timing of the recognition in surplus or deficit depends on the nature of the hedge relationship.

A derivative with a positive fair value is recognised as a financial asset, whereas a derivative with a negative fair value is recognised as a financial liability.

1.9 Taxation

The tax expense represents the sum of the tax currently payable and deferred tax.

Current tax

The tax currently payable is based on taxable profit for the year. Taxable profit differs from net profit as reported in the profit and loss account because it excludes items of income or expense that are taxable or deductible in other years and it further excludes items that are never taxable or deductible. The company’s liability for current tax is calculated using tax rates that have been enacted or substantively enacted by the reporting end date.

1.10 Employee benefits

The costs of short-term employee benefits are recognised as a liability and an expense, unless those costs are required to be recognised as part of the cost of stock or fixed assets.

The cost of any unused holiday entitlement is recognised in the period in which the employee’s services are received.

Termination benefits are recognised immediately as an expense when the company is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

1.12 Leases

Rentals payable under operating leases, including any lease incentives received, are charged to profit or loss on a straight line basis over the term of the relevant lease except where another more systematic basis is more representative of the time pattern in which economic benefits from the leases asset are consumed.

1.13 Foreign exchange

Transactions in currencies other than pounds sterling are recorded at the rates of exchange prevailing at the dates of the transactions. At each reporting end date, monetary assets and liabilities that are denominated in foreign currencies are retranslated at the rates prevailing on the reporting end date. Gains and losses arising on translation in the period are included in profit or loss.

2. Judgements and key sources of estimation uncertainty

In the application of the company’s accounting policies, the directors are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3. Employees

The average monthly number of persons (including directors) employed by the company during the year was:

	2023: Number	2022: Number
Total	12	8

4. Intangible fixed assets

	Other (£)
Cost	
At 1 April 2022	-
Additions	123,031
At 31 March 2023	123,031
Amortisation and impairment	
At 1 April 2022 and 31 March 2023	-
Carrying amount	
At 31 March 2023	123,031
At 31 March 2022	-

5. Tangible fixed assets

	Plant and machinery etc (£)
Cost	
At 1 April 2022	32,012
Additions	1,934
At 31 March 2023	33,946
Depreciation and impairment	
At 1 April 2022	11,943
Depreciation charged in the year	3,211
At 31 March 2023	15,154
Carrying amount	
At 31 March 2023	18,792
At 31 March 2022	20,069

6. Debtors

	2023 (£)	2022 (£)
Amounts falling due within one year:		
Trade Debtors	138,109	69,363
Prepayments and accrued income	40,677	33,339
	178,786	102,702

6. Creditors: amounts falling due within one year

	2023 (£)	2022 (£)
Bank loans	10,705	10,232
Trade creditors	17,284	40,673
Corporation tax	9,097	12,229
Other taxation and social security	1,843	28,839
Other creditors	2,880	972
Accruals and deferred income	430,765	300,177
	472,574	393,122

8. Creditors: amounts falling due after more than one year

	2023 (£)	2022 (£)
Bank loans and overdrafts	25,406	36,990

9. Members' liability

The company is limited by guarantee, not having a share capital and consequently the liability of elected board members is limited, subject to an undertaking by each elected board member to contribute to the net assets or liabilities of the company on winding up such amounts as may be required not exceeding £1.



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